

01 / START HERE

Where the Hell Is Everything?

Mand Daley Law Family Emergency Organizer

A practical place to record what exists, where it is kept and who can help your family find it.

Prepared for / household

Last reviewed

Where this completed organizer is securely kept

Trusted person who knows where to find it / contact details

Backup contact / contact details

A useful first 20 minutes

Start with the contacts and original-document locations. Leave unknown answers blank and turn them into tasks on page 6. You can print and write, or fill the fields and save a private copy.

Keep passwords, PINs, recovery codes, access keys and complete account or policy numbers out of this organizer. Record providers and the location of securely stored instructions only.

This organizer does not make or change a Will, Power of Attorney, beneficiary designation or legal appointment. It does not authorize anyone to access an account. Use it alongside your legal documents and professional advice.

Share only with appropriate trusted people. Mand Daley Law does not need your completed organizer. Do not email it or upload it through an ordinary contact form.

02 / IMPORTANT DOCUMENTS

Where are the originals?

Record the current document, whose it is and its secure location. Ask your lawyer if you are unsure which version applies.

DOCUMENT / OWNER**ORIGINAL LOCATION / CONTACT / DATE**

Will - partner 1

Will - partner 2

Property POA - partner 1

Property POA - partner 2

Personal-care POA - partner 1

Personal-care POA - partner 2

Other legal / trust documents

Lawyer / firm / contact details

Other records to locate: identity documents, property records and relevant agreements. Record their location on a separate private sheet if needed. Avoid storing identity numbers here.

03 / MONEY AND INSURANCE

Who holds the information?

List providers and where current records are kept. This is a locator, not a balance sheet. No complete account or policy numbers.

PROVIDER / RECORD TYPE**CONTACT / SECURE RECORD LOCATION****Bank / credit union****Investments / registered plans****Mortgage / other borrowing****Life / disability insurance****Workplace benefits / pension****Other provider****Accountant / insurance professional / other key contact**

Questions to take to the right professional: Are beneficiaries current? Where are policy terms and renewal notices? Which bills need attention? How would necessary expenses be funded?

A provider listing does not establish ownership, access rights or a beneficiary. Confirm the governing documents and the provider's process.

04 / DIGITAL ACCESS

Make an access plan

Record arrangements and secure instruction locations. Do not record passwords, PINs, recovery codes, access keys or answers to security questions.

Main email / cloud providers (provider names only)

Password manager used / secure instructions location

Provider legacy or emergency-access arrangements already set up

Person to contact / their contact details

Check the actual process

Ask each provider what evidence and authority it requires. An emergency contact or shared device does not automatically give lawful access. Provider features may have limits or waiting periods.

One access-planning task / person responsible / target date

Store secret credentials separately in a secure system. Tell the appropriate person how to locate the instructions without copying the secrets into this organizer.

05 / HOUSEHOLD AND DEPENDANTS

Help someone keep life running

Use this page for practical contacts and routines. Names written here do not appoint a legal guardian or other decision-maker.

Child / dependant contacts and essential routine instructions**Where current care information is kept / professional contact****Pets / veterinary contact / feeding and care instructions****Household contacts / keys and maintenance instructions location****Time-sensitive bills or arrangements / records location**

If appropriate, discuss practical wishes with the people involved. Use page 6 for questions about formal child-care arrangements and inheritance planning. Seek urgent help through the appropriate emergency service when needed.

06 / UNFINISHED DECISIONS

What needs attention next?

Write questions, not legal instructions. Your lawyer can help turn appropriate decisions into properly prepared and executed documents.

Who should care for minor children if both parents die?

Who should manage an inheritance for minor children, and how?

Which documents or family circumstances need legal review?

NEXT ACTION**OWNER / TARGET DATE**

Next organizer review date

Revisit after major family, asset or contact changes.
Updating this organizer does not update your legal documents.

Planning through signing

Mand Daley Law's Family Protection Plan is \$1,500 + HST for suitable straightforward Ontario couples: 2 Wills, 2 Continuing Powers of Attorney for Property and 2 Powers of Attorney for Personal Care. It includes lawyer-led planning and review, coordinated signing and two witnesses provided for your scheduled appointment. Mobile signing is available in Mississauga.

Additional trust planning and other complex work are outside the base fee and separately scoped and quoted by lawyer Jaspreet Daley. This organizer is not a substitute for legal advice.

Current availability and service details: manddaleylaw.ca